

Start Organized, Stay Organized

Laying the Groundwork for a Successful U.S. Research Project

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The key to a successful research project is getting started on the right foot. This U.S. methodology power hour will discuss three ways to organize before you research. We will discuss the importance of designing with vision, goals, and plans, how to build a solid foundation, and why you should construct a research process framework.

Designing with Vision, Goals, and Plans

Do you ever feel like you're spinning your wheels as you research? You started a tree and follow record hints but you're not sure what you are doing and why? Take a step back from research and start by designing with vision, goals, and plans.

Start with a Vision. A vision is the big picture or what success looks like to you. If you can visualize what you want to accomplish, you will stay focused. Start by recording your vision. Write it on a post-it note or set it as a graphic on your computer. As you research, refer back to your vision often. Are you reaching for your vision or are you getting off track?

Write SMART Goals. Goals are the individual bricks you will assemble as you work to achieve your vision. Write effective goals that will maximize your research time. Make sure your goals are SMART. SMART is an acronym for:

- **Specific:** Make sure your goal is detailed enough that you know exactly what you are searching for.
- **Measurable:** Your goal should be specific enough that you can tell when you have completed it.
- **Attainable:** The goal can be reasonably achieved.
- **Relevant:** Make sure your goal directly relates to your vision.
- **Time Bound:** Set goals that have deadlines or set a goal which directly relates the goal before it. When setting genealogy related goals, they may also be focused on a specific time period.

Your goals should be simple. They are meant to be single steps designed to help you achieve your vision. Don't set goals that skip steps. Your purpose isn't to construct your castle as quickly as possible but leave gaps in the research. Instead, focus on setting precise, detailed goals that will help you fully realize your vision. As you write your goals, consider the following:

- What do you already know?
- What do you want to learn?
- What is the next step?

Create a solid research plan. Plans are blueprints for achieving goals. Plans answer the questions who, when, where, what, and which. Without plans, goals are just wishes. As you design plans, consider the following:

- Focus on one goal at a time. Record your goal somewhere you will see it on a daily basis such as on a post-it note or in a notebook.
- Consider how you will achieve your goal. What are the steps you are going to take?
- Outline a clear action strategy. What does your path to success look like?
- A plan is often made up of the records or sources you will use to achieve your goal. What records

are available? Which are the best sources for your situation? The FamilySearch Research Wiki is a gold mine of information. It includes details on each state and county in the United States and has over 300 Record Finder tables. These tables can help you choose the best sources to pursue first.

- As you plan, learn about local jurisdictions. Determine which jurisdiction was responsible for creating and maintaining which records in which time period. You will need to search for records held by the city or township, the county, the state, and even the federal government. Check the FamilySearch Catalog for record collections you can add to your research plan.
- Also pay attention to when jurisdictions were changed or when boundaries changed. Records will be kept by jurisdiction that existed at the time of the event. For example, your ancestor could have lived in the same house for fifty years but resided in four different counties. If you aren't finding your ancestor in one county, search neighboring counties.

Start with a vision. Imagine what it is you want to accomplish. Then, set SMART goals designed to achieve that vision. Work on one goal at a time. Plan the steps you will take to meet that goal. If you start with a vision, SMART goals, and solid research plans, you will be more organized as you research. You will know what records to search for, what information you hope to find, and what success will look like when you get there.

Building a Solid Foundation

Do you ever feel like you are starting over every time you research your brick wall ancestor? Have you ever spent hours searching for a census online only to discover someone else already attached it to their tree? Start organized by gathering known information and reviewing existing research before you start your research project.

Gather Records and Artifacts. Many families hold onto valuable records and artifacts such as photos, letters, bibles, newspaper clippings, certificates, and more. These valuable documents may include important clues that will give you the foundation you need to solve your research goal. Determine which of your relatives has these records and artifacts and ask them for copies.

Interview Relatives. Family stories are part of our heritage. Many older relatives may know family stories and other valuable information such as where family members moved, when events took place, and even nicknames.

Review Your Past Research. Read through your existing research with a critical eye. Consider how and what you searched. Review records you have already located. Determine whether you can locate them again and make notes.

Explore Other's Research. If your relatives already researched the family, review their research. What did they find? Where did they search? Also look for your research subject in online trees. Have others located some of the records (like censuses) you need in order to start your research project? Build your research on what others have already done.

Evaluate Everything. Analyze and evaluate family records and artifacts, stories, records attached online, research logs, and even the notes from your own previous research. Review each record and source. Follow the evaluation process for each record:

- **Transcribe** the record. Write out the information for yourself. Creating a written copy of the record will help you process the information on a different level. Read through and write down the information found in every column, field, row, and line.
- **Analyze** the record. Consider exactly what it is saying, what it means, who provided the information, and how it relates to your research goal.

- **Correlate** the information. Compare the information from this record with information from other records. Choose a method for correlating information which works for you.
- **Resolve** any conflicts. Consider whether the information from this record conflicts with information from other records. Resolve those conflicts by identifying and evaluating the records or identifying additional records you will need to locate. Adjust your research goals accordingly.
- Come to a **Conclusion**. Your conclusion should be a logical statement. Conclusions come after careful and thorough research of all the evidence. Include your conclusion in your notes and leave your hypothesis open to additional discoveries in the future. Consider adjusting your research goals as you work to come to a conclusion.

Start organized by establishing a solid foundation of known information. Gather records and artifacts from multiple sources including family members, online trees, and even your own research files. Evaluate that information. Determine what you know and how you know it. A solid foundation lays the groundwork for an organized research project.

Constructing a Research Process Framework

Have you ever found a record but you can't find it again because you didn't record how and where you found it? Have you ever searched for an ancestor in a record over and over because you can't remember if you found anything? Now that you have a vision, goals, plans, and a solid understanding of the known information, plan how you are going to research. If you get organized before you start researching, you are more likely to stay organized throughout your research process.

Choose Your Genealogy Software. Plan to organize the information you find while researching by choosing how and where you are going to organize that information. Most people use either genealogy software, located on their computer, or an online family tree, such as those found on Ancestry.com, FamilySearch.org, or MyHeritage.com. Genealogy software or an online tree allow you to organize information into families, add sources, write notes, and attach media. Software downloaded to your computer often has more features, more privacy, and is only editable by you. Online trees can be accessed from anywhere but may have fewer features, be public by default, or may be editable by anyone. Choose carefully how you want to organize your information.

Determine File Structure and Type. Plan how you are going to organize the records you find while you research. Plan whether you are going to maintain a paper filing system, a digital filing system, or a combination. Set up a filing structure that works in either a paper or digital environment. Plan how you are going to structure your folders and name your files. Incorporate names, dates, places, and locations into your file naming structure. Also consider organizing around families, not individuals.

Select Forms, Tables, and Charts. Plan ahead how you are going to track your research, extract information from records, and correlate data. Decide which forms, tables, or charts you want to use. Find templates online or create your own versions of these forms. If you set up your forms before you research, you will be prepared to use them as you find and evaluate records.

One of the forms you will definitely want to use is a research log or research journal. A research log lets you track your research, identifying what records you searched, what you were looking for, and whether you found anything. Use research logs to prevent duplicate searching, plan your research, and keep your research plan on track. There are many examples of good research logs online or create your own.

Define Your Research Process. The steps you take as you research will help you effectively find and evaluate your records. Decide what steps you will take each time you search for and locate a record. One possible research process may include the following steps:

1. Start with a vision, goals, and plans
2. Follow your research plan. Search for the first record listed.
3. Update your research log. If you did not find a record, record a nil search. Return to Step 2.
4. Extract, transcribe, or abstract the records. Ask questions of the records. Record questions that don't relate to your research goal below your research plan for future research projects. Identify evidence (information related to your research goal).
5. Update your timeline with information from the record.
6. Compare and correlate information from the record. Compare evidence with evidence from other records. Ask questions based on the comparison. Record questions that don't relate to your research goal below your research plan for future research projects.
7. Save or print a copy of the record.
8. Go back to your research plan. Check off the records you searched for. Add additional records to the bottom of the plan.
9. Return to Step 2.

If you set up the framework of your research process, you will be more organized as you research. You will know which steps to take each time you research. This will help you track where you've been, where you're going, and what you find. If you plan how to research, you will stay organized throughout your research project.

Conclusion

Start organized. Envision the end of your research project. Set individual goals and plans to help you reach that vision. Gather records and information from family members, online trees, and even your own files. Plan how you will research. Determine how you will organize records and information. If you organize before you begin to research, you will be more efficient, more focused, and more likely to stay organized throughout your research process.